

Seaman, Katherine

From: sjokeeffe@gmail.com on behalf of Stephanie O'Keeffe [stephanie@okeeffe.com]
Sent: Tuesday, July 21, 2009 7:20 PM
To: Seaman, Katherine
Subject: Fwd: SB evaluation form draft (for Monday instead of Wednesday)
Attachments: 2009 TMgr Eval Form DRAFT.doc; 2008 TMgr Eval Form.doc

Hi Kate --

Could you print this e-mail and the attachments, with hard copies for our desks Wednesday, and post it all to the web packet?

Thank you!

Stephanie

----- Forwarded message -----

From: **Stephanie O'Keeffe** <stephanie@okeeffe.com>
Date: Tue, Jul 21, 2009 at 7:14 PM
Subject: SB evaluation form draft (for Monday instead of Wednesday)
To: Select Board <SelectBoard@amherstma.gov>

Hello All --

Sorry this is so late. Everything takes longer than planned. I will propose at Wednesday's meeting that we postpone consideration of this document until Monday night at our pre-TM meeting, to give us all time to think about it first. We will still receive the hard copies at our desks tomorrow. And don't worry -- we'll have plenty of evaluation stuff to consider without this piece. :-)

Attached is a revised draft form for the SB to use for this year's Town Manager evaluations, as well as last year's form, so that you can compare them. The 2009 draft is lightly edited, has new additions, and is reformatted so that it should paginate a little better as we fill it in. Highlights of the revisions:

- The beginning of the document has definitions for the rating terms, to help eliminate some of the ambiguity in how each of us might use each term.
- Question 1 from last year's form was eliminated, because it seemed too general to be useful.
- Under each category, the questions have been divided into "Annual Expectations" and "2009 Goal/s" with the carryover stuff as "Annual," and our specific goal text plugged in as "FY09"
- The two categories of "Community Relationships" and "Intergovernmental Relations" have now been combined as "Community and Intergovernmental Relations"
- The category of "Personal Characteristics" has been renamed "General Expectations" and instead of a couple of questions (which struck me as a good idea, but seemed too few and rather arbitrary) I have listed a bunch of concepts, with a less structured opportunity for commenting on them.

I think those are the big changes. This is just a draft proposal and subject to further revision, depending how we all feel about it.

7/22/2009

Thanks for your patience with this. See you Wednesday evening.

Stephanie

TOWN MANAGER EVALUATION

FY2009

Select Board Member:

For the purposes of this document, the evaluation terms shall be defined as:
Unsatisfactory = Performance below reasonable expectations, with improvement unlikely
Needs improvement = Performance below reasonable expectations, with improvement likely
Satisfactory = Performance meeting reasonable expectations
Commendable = Performance surpassing reasonable expectations
Outstanding = Performance far surpassing reasonable expectations
Unable to judge = Insufficient information available for evaluation

AREAS OF RESPONSIBILITY		Comments (Please use the back of the page for addition space)					
<u>FISCAL MANAGEMENT</u>		Unsatisfactory	Needs improvement	Satisfactory	Commendable	Outstanding	Unable to judge
Annual Expectations							
1. Plans and organizes the preparation of an annual budget.							
2. Plans, organizes and administers the adopted budget within approved revenues and expenditures.							
3. Seeks all possible revenue sources for the Town. a) Promotes Economic Development b) Explores regionalization c) Seeks efficiencies through departmental reorganization where appropriate d) Explores new revenue sources from educational institutions							
FY09 Goal/s							
4. The Town Manager shall develop specific recommendations for consideration by the Select Board to address the revenue crisis, including the generation of new revenue; reducing expenses through efficiencies in Town structure and service delivery; negotiating contracts through the collective bargaining process that are reflective of the community's capability and willingness to support; and pursuit of an increased economic development profile to increase the tax base and reduce the burden on residential property taxpayers.							
<u>RELATIONSHIP WITH THE BOARD</u>							
Annual Expectations							
5. Keeps the Board informed on issues, needs and operations of the Town.							

AREAS OF RESPONSIBILITY		Unsatisfactory	Needs improvement	Satisfactory	Commendable	Outstanding	Unable to judge	Comments (Please use the back of the page for addition space)
6. Makes professional recommendations to the Board on items requiring Board action.								
7. Interprets and executes the intent of Board policy.								
8. Maintains a professional, impartial and effective working relationship with the Board.								
FY09 Goals								
9. The Town Manager shall work more closely with the Select Board by helping the Select Board to become more informed; responding to and initiating improved communication efforts; allowing the Select Board more opportunity to provide feedback on policy/practice initiatives and changes before implementation; and involving the Select Board in the determination of collective bargaining strategies.								
LONG RANGE PLANNING								
Annual Expectations								
10. Plans and organizes a process of program planning in anticipation of future Town needs and problems.								
11. Maintains a knowledge of new technologies, systems and methods, etc. in relation to Town services.								
FY09 Goals								
12. The Town Manager shall create an economic development plan, informed by the Master Plan, presenting strategies and goals (including target areas, plans for pursuit) to the Select Board for input and making adjustments accordingly. Once approved by the Select Board, the plan and will serve as a reference and guidance document that informs how the Town moves forward in this area.								
STAFF AND PERSONNEL RELATIONS								
Annual Expectations								
13. Models sound personnel procedures and practices in oversight of human resources function.								

AREAS OF RESPONSIBILITY					Comments (Please use the back of the page for addition space)				
	Unsatisfactory	Needs improvement	Satisfactory	Commendable	Outstanding	Unable to judge			
14. Selects, leads, directs and develops Town staff.									
15. Develops good staff morale and loyalty to the Town.									
16. Recruits and assigns the best available personnel in terms of their competencies.									
FY09 Goal/s									
17. Leads the negotiations of labor contracts representing Town interests and Board guidelines.									
18. The Town Manager shall develop and implement a plan that improves morale and lines of communication among all employees. The Town Manager will incorporate Human Resources into the goal of improving morale, as a source for training, wellness, professional development and addressing workplace concerns.									
19. The Town Manager shall encourage staff at all levels to provide suggestions for improving the efficiency of providing services and utilizing resources, within and across departments; and shall create procedures for collecting and considering the suggestions.									
<i>COMMUNITY and INTERGOVERNMENTAL RELATIONS</i>									
Annual Expectations									
20. Gains respect and support of the Community on the implementation of Town programs and services.									
21. Ensures that an attitude and feeling of helpfulness, courtesy and sensitivity to public perception exists in employees coming in contact with the public.									
22. Represents the Town to media as Chief Public Relations spokesperson on Town government issues.									
23. Maintains awareness of developments and plans in other jurisdictions, including the colleges and university, that may relate to or affect Town government.									
FY09 Goal/s									

AREAS OF RESPONSIBILITY		Unsatisfactory	Needs improvement	Satisfactory	Commendable	Outstanding	Unable to judge	Comments (Please use the back of the page for addition space)
24. The Town Manager shall continue to strengthen relationships with UMass and the Colleges, and to actively engage community groups.								
25. The Town Manager shall research and propose ways to collect "customer satisfaction" feedback and suggestions from the public, regarding interactions with staff and departments, and the process of obtaining services and assistance.								
GENERAL EXPECTATIONS								
26. Feel free to comment on strengths or weaknesses in any of the following areas: Professionalism Leadership Enthusiasm Accessibility Setting priorities Communication style Listening skills Public speaking		Community spirit Defends conviction under pressure Openness to differing views/new information Resourcefulness Advocacy with State and Federal Government Crisis management Responsiveness Facilities management						Comments
OTHER COMMENTS								
27. If you are willing to share any additional information, insight, or experience relevant to this evaluation, please do so here.								

TOWN MANAGER EVALUATION

AREAS OF RESPONSIBILITY	Unsatisfactory	Needs Improvements	Satisfactory	Commendable	Outstanding	Unable to Judge	Comments (Please use the back of the page for addition space)
<p><u>ORGANIZATION AND PROGRAM MANAGEMENT</u></p> <p>1. Plans and organizes the work that carries out policies and provides services established by Amherst Town Government Act, (Select Board, and Town Meeting) and State statutes.</p>							
<p><u>FISCAL MANAGEMENT</u></p> <p>2. Plans and organizes the preparation of an annual budget.</p> <p>3. Plans, organizes and administers the adopted budget within approved revenues and expenditures.</p> <p>4. Seeks all possible revenue sources for the Town.</p> <p>a) Promotes Economic Development</p> <p>b) Explores regionalization</p> <p>c) Reorganizes town departments where feasible</p> <p>d) Explores new revenue sources from educational institutions</p>							
<p><u>AREAS OF RESPONSIBILITY</u></p> <p><u>PHYSICAL PLANT MANAGEMENT</u></p> <p>5. Plans and organizes maintenance of town-owned facilities, buildings and equipment.</p> <p>6. Plans and organizes maximum utilization of public facilities.</p>							

RELATIONSHIPS WITH THE BOARD

7. Keeps the Board informed on issues, needs and operations of the Town.						
8. Makes professional recommendations to the Board on items requiring Board action.						
9. Interprets and executes the intent of Board policy.						
10. Maintains a professional, impartial and effective working relationship with the Board.						

LONG RANGE PLANNING

11. Plans and organizes a process of program planning in anticipation of future Town needs and problems.						
12. Maintains a knowledge of new technologies, systems and methods, etc. in relation to Town services.						

STAFF AND PERSONNEL RELATIONSHIPS

13. Models sound personnel procedures and practices in oversight of human resources function.						
14. Selects, leads, directs and develops Town staff.						
15. Develops good staff morale and loyalty to the Town.						

AREAS OF RESPONSIBILITY

STAFF AND PERSONNEL RELATIONSHIPS continued

	Unsatisfactory	Needs Improvements	Satisfactory	Commendable	Outstanding	Unable to Judge	Comments (Please use the back of the page for addition space)
16. Recruits and assigns the best available personnel in terms of their competencies.							
17. Leads the negotiations of labor contracts representing Town interests and Board guidelines.							

COMMUNITY RELATIONSHIPS

18. Gains respect and support of the Community on the implementation of Town programs and services.
 19. Ensures that an attitude and feeling of helpfulness, courtesy and sensitivity to public perception exists in employees coming in contact with the public.
 20. Represents the Town to media as Chief Public Relations spokesperson on Town government issues.
- INTERGOVERNMENTAL RELATIONS**
21. Maintains awareness of developments and plans in other jurisdictions, including the colleges and university, that may relate to or affect Town government.

AREAS OF RESPONSIBILITY

PERSONAL CHARACTERISTICS

22. Defends principle and conviction in the face of pressure.
23. Uses language effectively in dealing with staff members, the Board and the public.
24. Speaks well in front of large and small groups, expressing ideas in a logical and forthright manner.

	Unsatisfactory	Needs Improvements	Satisfactory	Commendable	Outstanding	Unable to Judge	Comments (Please use the back of the page for addition space)

25. If you are willing to share any additional information, insight, or experience relevant to this evaluation, please do so here.
